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file → Cultural & Aesthetic
Grants (C & A)

1994 – 1995

Montana Cultural Trust Grant Application



**Special Project
Capital Expenditure
Operational Support
Endowment Development**

STATE DOCUMENTS COLLECTION

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HELENA, MONTANA

– NOTE –

This is a very competitive process. Last Legislative session three times as much money was requested as was available for grants, and the number of applications increased 40 percent. The citizens' committee that reviews the grants requests that applicants only request support for their highest priority project. A second application is deemed appropriate if it is for a Challenge Grant for Endowment Development.

First-time applicants or those who have had unsuccessful applications are strongly advised to contact the Montana Arts Council staff for assistance.

MONTANA STATE LIBRARY



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MONTANA'S CULTURAL TRUST

In 1975, the Montana Legislature set aside a percentage of the Coal Tax to restore murals in the Capitol and support other "cultural and aesthetic" projects. This unique funding source is a Cultural Trust, with money allocated every two years. Grant funds are derived from the interest earned on the Cultural Trust.

In 1983, the Legislature established a Cultural and Aesthetic Projects Advisory Committee with 16 members, half appointed by the Montana Arts Council and half by the Montana Historical Society. The committee reviews all grant proposals and makes funding recommendations to the Legislature, which determines who will receive grant funds.

The Montana Arts Council administers the program for the Legislature.

CULTURAL AND AESTHETIC PROJECTS ADVISORY COMMITTEE

Appointed by the Montana Arts Council:

Barry Bonifas, Billings
Jean Dahlman, Forsyth
Judy Ericksen, Vice Chair, Great Falls
Trudy Skari, Chester
Kathryn Stewart, Bozeman
Don Thomson, Bigfork
Marilyn Wessel, Bozeman
Jan Wiberg, Havre

Appointed by the Montana Historical Society:

Dick King, Chair, Havre
Tim Bernardis, Crow Agency
Elaine Howard, Butte
Harry Fritz, Missoula
Kathy McKay, Columbia Falls
Ellen Sievert, Great Falls
Betty White, Ronan

**Serving for the Montana Committee for
the Humanities:**
Margaret Kingsland, Missoula

**For information about Montana Cultural Trust grants, consultation about
specific proposals and assistance in completing grant forms contact:**

Montana Arts Council

316 N. Park Ave., Rm. 252
Helena, MT 59620
406/447-8390

- Grants Consultation: Bill Pratt
- Budgets, Fiscal Reporting and Payment Information: Carleen Layne

Montana Historical Society

225 N. Roberts
Helena, MT 59620
406/444-2694

- Archives: Kathie Otto
- Historic Museums and Collections: Susan Near
- Oral History: John Terreo

State Historic Preservation Office

104 Broadway
Helena, MT 59620
406/444-7715

- Historic Preservation and Archaeology: Marcella Sherfy or Herb Dawson

Montana Committee for the Humanities

P.O. Box 8036
Missoula, MT 59807
406/243-6022

- Public Programs and Media Productions in the Humanities: Margaret Kingsland

Montana State Library

1515 East Sixth St.
Helena, MT 59620
406/444-3115

- Library Grants: Richard Miller



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Application Deadline

By law, the grant application deadline is August 1, 1992. As this is a Saturday, applications must be hand delivered to the Montana Arts Council offices by 5 P.M. on Friday, July 31, 1992, or display a U.S. Government postmark no later than August 1, 1992. There will be no exceptions to this requirement. It is recommended that applications be sent by certified mail, return receipt requested.

During the 1992-1993 grant period, \$1,296,080 was appropriated by the Legislature to partially support 101 projects in 31 communities. Grants ranged from \$1,000 to \$73,400 with the average grant amounting to \$12,800. Only 3 percent of grant requests were fully funded. During the 1994-1995 grant period, about \$650,000 per year may be available.

All Cultural and Aesthetic projects must occur between July 1, 1993, and June 30, 1995.

How to Proceed

1. Read this application packet carefully to determine the eligibility of your project.
- ✓ 2. Call the Montana Arts Council if you are a first-time or a previously unsuccessful applicant or if you are submitting an application for a Challenge Grant.
3. Identify the appropriate governing unit to submit the application and make the necessary fiscal and administrative arrangements with officials.
4. Assemble all historical, descriptive, documentary and fiscal information needed to complete the application form.
5. Separate the application form (colored pages) and the instruction section (white pages) for ease of reference.
6. Set aside time well in advance of the deadline to complete the application. Remember, a "good" application not only requests funds for a worthwhile project but also requests them with complete information, legibly and with a budget that adds up.
7. Make sure that you accurately estimate project and organization revenue and expenditures. Know where reductions in expenditures can be made. If a smaller grant amount than you requested is granted, you will need to provide a revised budget.
8. Have the application form signed by the authorizing official of the governing unit submitting the application. Make sure the official understands the obligations and responsibilities of the governing unit.
9. Refer to the check list on page 14 and make the required copies of the completed form and support materials.
10. Send original and copies to: Cultural and Aesthetic Projects Advisory Committee, Montana Cultural Trust, 316 N. Park Ave., Rm. 252, Helena, MT 59620.

Call the Montana Arts Council staff (406/447-8390) if you have questions about:

- the granting process.
- project or applicant eligibility.
- the application form.
- proposed expenditures or matching funds.

We will bind all applications for Advisory Committee use and ask that you:

1. Collate all materials.
2. Do not bind your application: use paper clips instead of staples.
3. Use standard 8 ½" x 11" paper.

1994-1995 GRANT GUIDELINES

Special Project Capital Expenditure Operational Support

Challenge Grants for Endowment Development

Eligibility

★ Applicants

Any person, association or representative of a governing unit may submit an application for funding.

The term governing unit includes, but is not limited to, Montana state, regional, county, city, town or Indian tribal governments. Examples of eligible applicants are: county art or historical museums, public libraries, public educational institutions or school districts, state agencies, city arts commissions or parks and recreation departments, and tribal cultural or education committees. Documentation of governmental status is required.

The governing unit is the official applicant. It may itself seek funds, or it may sponsor the proposals of other persons, organizations, associations or coalitions. It must have accounting and financial services available and must bear ultimate legal and fiscal responsibility for the project, if funded.

NOTE: *It is the responsibility of those interested in developing proposals for Cultural and Aesthetic Project grants to negotiate with the governing unit to make application. The Montana Arts Council will help identify an appropriate governing unit.*

Non-profit organizations with statewide programs and/or services or those serving a significant sub-state region or with a statewide arts and cultural constituency may ask the Montana Arts Council to serve as their governing unit and fiscal agent. Organizations should not assume the Montana Arts Council will serve this role. This service must be requested and approved in writing prior to the time of application.

★ Projects

Applications must be for cultural and aesthetic projects, including but not limited to the visual, performing, literary and media arts, history, archaeology, folklore, archives, collections, research, historic preservation and the construction or renovation of cultural facilities.

Applications are encouraged for projects serving rural communities, racial and ethnic groups, the disabled, institutionalized populations, youth and the aging and projects addressing the role of women in Montana's cultural life.

★ Matching Funds

These are funds other than Cultural and Aesthetic Project grants allocated or received by the grantee during the two fiscal years of the grant period and used exclusively for the project receiving Cultural and Aesthetic Project grant funds. Except for Challenge Grants for Endowment Development, documentation of matching funds must be received by June 30, 1994.

★ Historic Preservation Projects

Applicants proposing projects affecting prehistoric or historic properties must:

1. Contact the State Historic Preservation Office (SHPO) to evaluate the possible impact on these properties and appropriateness of plans.
2. Provide SHPO with all relevant information about the property and project plans.
3. Include with the application a letter from SHPO outlining how the project can proceed in a way that preserves significant historic or prehistoric properties. No funds will be released until such a letter is received by the Montana Arts Council.

Grant Categories

Governing units may apply in one or more of the following grant categories: Special Project Grants, Operational Support Grants, Capital Expenditure Grants, and Challenge Grants for Endowment Development. Each grant category

is described in detail, and a separate application form for each category is included at the end of this packet. Please read the instructions carefully.

*talk to
Sandra #*



Special Project Grants

These grants are for specific activities, services or events of limited duration, the expansion of ongoing programs or organizations to meet defined needs, and generation of new sources of revenue. These grants are well-suited for small requests and for groups with little grant-writing experience. For Special Project grant requests of \$4,500 or less, a separate application packet is available.

The Citizens Advisory Committee is particularly interested in reviewing applications which:

1. Advance the arts of Montana;
2. Challenge traditional perceptions of Montana history;
3. Provide new models of organization, management or collaboration.
4. Organizations in rural communities might consider the following project suggestions:
 - screenings of films or videos of cultural merit
 - "Chautauqua"-type presentations—popular education combined with entertainment in the form of lectures, concerts and plays that are often presented outside or in a tent
 - creation of film, video or audio productions reflecting the local culture
 - programs about local history, cultural heritage or folklore
 - development of low-power public television or public radio stations (NOTE: The citizens' committee places low priority on requests for production and broadcast equipment.)
 - cooperative projects between organizations or communities that enhance programs, audiences or organizational capabilities
 - projects that combine the arts, the humanities, historic

preservation, museums and community design in a coordinated cultural planning effort

- renovation or construction of facilities dedicated primarily to cultural activities
- innovative and experimental projects that uniquely serve rural and small communities

Applications That Generate New Sources of Revenue

The Legislature may require that grant funds be repaid from initial earnings of the project and the Cultural Trust receive a royalty from future revenues.

These applications must be accompanied by a plan that:

1. Describes the product, service or enhanced fund-raising activity;
2. Documents the need for such a project;
3. Delineates how it will be developed, marketed and financed;
4. Includes projected income figures.

Applications That Increase Current Staff or Add New Staff

These applications must:

1. Provide a one-page job description for each. It should include the job title, qualifications, categories and activities.
2. Describe how this staff will be supported after the grant period. What new sources of funds must be obtained? How will you accomplish this?

Matching Requirement

Generally each dollar in special project grants is to be matched with one dollar in cash or in-kind goods and services.

Operational Support Grants

These grants are for cultural institutions that have been formally organized for at least two years with an ongoing program and generally with paid professional staff.

NOTE: Operational support grants are not intended to reduce the applicant's fund-raising efforts or support program expansion.

Any increase in an organization's budget for the grant period should only reflect inflationary growth (approximately 5%) beyond the current fiscal year. If the increase exceeds inflationary growth, use the Special Project application form. Applications for operational support may be considered in special circumstances including:

- The development of emerging cultural institutions — groups in the early stages of growth that otherwise meet the requirements for this category;
- Organizations with no local funding base;
- Organizations serving the entire state or a significant

sub-state region;

- Well-managed and established organizations confronting emergency situations, that is unforeseen circumstances that have a major effect on the organization and call for immediate action;
- Organizations recognized as essential to Montana's cultural life because of excellence of programming and length of service;
- Organizations providing a high ratio of cash match to their grant request.

Operational Support Grant Requests for \$20,000 or More
Submission of a current audit or an unaudited financial review signed by an independent accountant is requested.

NOTE: A financial review consists principally of inquiries of organization personnel and analytic procedures applied to financial data. It is substantially less thorough than an audit and thereby no opinion is expressed. The accompanying report should

state the accountant is not aware of any material modifications – other than any indicated in the report – that should be made to the financial statements for them to conform with generally accepted principles.

Matching Requirement

Generally each dollar in operational support grants is to be matched with one dollar in cash or in-kind goods and services.

Capital Expenditure Grants

These grants are for additions to a collection or for acquisition of works of art, artifacts or historical documents; historic preservation; or the construction or renovation of cultural facilities. Applications must include renderings, working drawings or photographs of the facility to be renovated, improved or constructed or the artifacts or artwork to be acquired. No more than 25% of the total grant funds appropriated by the Legislature may be used

for capital expenditure grants.

NOTE: See page 2 if the grant request applies to prehistoric or historic properties.

Matching Requirement

Generally each dollar in capital expenditure project grants is to be matched with three dollars in cash or in-kind goods and services obtained specifically for the project.

Challenge Grants for Endowment Development

NOTE: Organizations contemplating their first application in this category are strongly encouraged to contact the Montana Arts Council staff. Legal assistance may also be helpful.

These grants are for the creation or expansion of permanent endowments for non-profit cultural organizations or purposes. Applicants must demonstrate a significant need and purpose for the challenge grant, provide verification of the inviolability of the endowment funds and document a reasonable ability to provide private or other matching funds within the grant period. These matching funds must not reduce those raised annually by the applicant. Endowments are intended to be permanent, with only the investment earnings available for expenditure.

NOTE: It is recommended that pooling of endowment funds be explored as this may reduce administrative costs and increase the yield obtained.

Cooperative Endowment Development

Some communities may wish to submit a proposal to create endowments for a number of arts and cultural organizations or purposes within a city, county or multi-county region. This special case requires the following:

1. An application form representing the cooperative effort and identifying all participating organizations and the fund-raising strategy to be used;
2. Completed Charts III and IV (Supplemental Budget Section) reflecting the total expenses and sources of revenue for the endowment's development;
3. Completed Charts III and IV for each participating organization. These charts identify the grant request and fund-raising responsibility for each organization ;
4. A letter of agreement signed by the authorizing official of each cooperating organization indicating:
 - a. The amount of grant funds sought by each;
 - b. The amount of matching funds to be raised by each;
 - c. How program and financial responsibilities will be handled;
 - d. How the endowment funds will be held, such as pooled in a single account or held in individual accounts for each organization;
 - e. A description of how endowment income is to be distributed.

The payment of the grant will be based on the funds raised by each participating organization. For example, if \$100,000 is requested by four organizations sharing equally, each organization must raise \$75,000 in matching funds. If three of the four organizations successfully raise the match, each will receive \$25,000 in grant funds. The organization unable to raise the entire match will only receive that portion of the grant that has been matched.

Preparing the Challenge Grant Application

Creating an endowment will be a new endeavor for most organizations. It requires substantial board commitment and the development of new fund-raising skills.

Past experience indicates preparation well in advance of application is critical to successfully raise matching funds. You must show you have done the following:

1. Adopted a policy which might read: "The (name of organization) establishes a permanent endowment. The principal of the endowment will not be expended. Interest, dividend income or capital gains growth may be reinvested in the principal of the endowment and/or used to meet specific financial obligations;"
2. Created a committee of your board to lead the endowment development campaign;
3. Established a committee of professional advisors (such as tax accountants, trust attorneys, insurance agents, planned giving officers, etc.) to help create the campaign and consult on gifts;
4. Identified prospective donors and received pledges for contributions to the endowment fund;
5. Selected the holder of your endowment account;
6. Created a fund-raising plan and demonstrated how it will be integrated into the overall fundraising of the organization;

7. Established a budget for raising the funds;
8. Identified any training and information needed by the staff and board; and
9. Determined the marketing effort needed and materials to be created to raise the match and to continue to develop the endowment beyond the grant period. If available, examples of fund-raising materials to be used should be included.

Matching Requirements

Each grant dollar is to be matched with three dollars.

- A minimum of one-third of the match must be in cash.
- A maximum of two-thirds of the match may be in irrevocable planned gifts.
- A maximum of one-third of the match may be in wills, devises, bequests and paid-up life insurance.

Challenge grants will be paid when the benefitting organization documents the specified match. Organizations failing to meet the total match requirement within the grant period will be eligible to receive that portion of the grant that has been matched. The review committee will be apprised of an organization's inability to meet the total match.

Planned or Deferred Gifts

For purposes of qualifying as match, a deferred or planned gift must be:

1. Specifically designated for the endowment or unrestricted purposes;
2. Given or placed in the permanent endowment account during the grant period;
3. Not currently held in a permanent endowment account. Cash held in other accounts may be used to meet the matching requirement when transferred to the endowment account. All matching funds from whatever sources must be placed in the permanent endowment account on or after July 1, 1993, and on or before June 30, 1995, and documentation of such deposit provided to the Montana Arts Council.

All deferred or planned gifts will be valued according to IRS practices and principles except as otherwise noted in these guidelines. These gifts will qualify as matching funds only to the extent they are legally irrevocable on the date of their valuation.

Donations of irrevocable trusts, such as pooled income funds, charitable gift annuities and unitrusts, will be eligible as match to the extent that their value can be determined in accordance with generally accepted accounting principles. Please provide the Montana Arts Council with copies of trust agreements and documentation of the value of such gifts.

Life insurance will be eligible as match if the benefitting organization owns the policy and is the beneficiary and all

premiums have been paid. Match from insurance policies will be valued depending on the age of the insured at the execution date of the policy as follows:

1. Where the insured is not a minor, the valuation is the minimum guaranteed death benefit of the paid-up portion. The policy will be held until the death of the insured or until the cash value equals the minimum guaranteed death benefit.
2. Where the insured is a minor, the valuation is the cash value of the paid-up portion at the close of the grant period, June 30, 1995.

As the grant selection process is competitive, insurance should be used only to complete the match. It is recommended that policies be limited to board members, long-time donors, volunteers and staff.

To be eligible as match, certification must be supplied that assures policies were procured in compliance with MCA 33-15-201 entitled "Restriction on contracting for personal insurance-insurable interests-violation." If available, attach information indicating the ages of individuals insured and their relationship to the organization.

Wills, devises and bequests should indicate that the benefitting organization is the beneficiary, the amount and type of the bequest and that the funds will be placed directly in the benefitting organization's permanent endowment account. Only gifts of cash are eligible in this category.

A devise includes retention of a life estate in real property, which is the remainder in either a residence, farm or ranch. It is eligible as match when irrevocably assigned to the benefitting organization. If the trust was executed prior to the grant period and the benefitting organization becomes the irrevocable beneficiary during the grant period, the match value is calculated as if the trust were created at the later date of irrevocable assignment. This match should be calculated by an independent source, such as the donor's tax preparer, according to IRS practices and principles.

The trust must be restricted for use in the benefitting organization's permanent endowment account. The property must be in Montana, without lien and owned outright by the donor.

Charitable lead trusts, gifts of marketable securities and property will count as match only when converted to cash and deposited in the permanent endowment account.

Income-producing property: The annual average net income from the five years preceding the date of application may be used to estimate the match for the grant period. Documentation of transfer of title or the agreement to make such income available to the applicant and of the annual revenue for the five years previous to the date of application must be submitted to the Montana Arts Council.

The Holder of the Endowment

The principal of the endowment must be held inviolable by:

1. A trust as authorized by Montana law;
2. An IRC 1.170A-9(e) community trust, fund or foundation; or
3. An IRC 501(c)(3) foundation established to support a university or college operated under the auspices of the Montana Board of Regents of Higher Education.

Trusts held by a bank or trust company may be charged a minimum administrative fee of \$500 per year.

A community foundation is a non-profit charitable trust serving a specific geographic area and maintaining endowment accounts for donors for various purposes. These funds are invested together with other foundation assets and income distributed according to specific agreements. Establishment of an endowment account (component fund) within a community foundation may have advantages such as economical management fees, access to additional donors, a variety of ways in which a donor can contribute and information about planned and deferred giving techniques.

The Montana Community Foundation currently holds endowment accounts for a number of Montana arts and cultural organizations. For more information contact: Executive Director, Montana Community Foundation, Power Block Building, Helena, MT 59601 or 443-8313.

The Endowment Agreement

Grants and matching funds must be held in Montana financial institutions. Trustees will have powers and duties specified in the Management of Institutional Funds Act (MCA 72-30-206). **Documentation of the agreement must be provided to the Montana Arts Council prior to the release of grant funds.** It must stipulate:

1. That the endowment account is inviolable;
2. The management fee to be charged;
3. Any agreement concerning access to interest income;
4. That in the event of the dissolution of the benefitting organization the following will occur:

- a. Within 30 days of dissolution, the benefitting organization will inform the Montana Arts Council of dissolution;
- b. The Montana Arts Council will inform the trustee of the dissolution;
- c. The holder of the endowment account will transfer an amount equal to the Challenge Grant and any undistributed interest income earned by that grant to the Montana Arts Council for reversion to the Cultural Trust;
- d. If the holder of the endowment is a community trust, fund or foundation, or foundation established to support a college or university operated under the auspices of the Montana Board of Regents of Higher Education, the foundation is encouraged to use the matching funds and undistributed interest income earned by those funds to create or add to a "field of interest" fund for Montana arts and cultural organizations;
- e. If the holder of an endowment is an authorized trust agent, the matching funds and undistributed interest income earned by those funds will be distributed to the beneficiary named in the endowment agreement.

Eligible beneficiaries are organizations within the state of Montana organized and operated exclusively for charitable, educational, religious or scientific purposes as shall at the time qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1954 or the corresponding provision of any future United States Internal Revenue Law and that meet the following conditions:

1. The organization serves a similar purpose and geographic area as the organization undergoing dissolution; or
2. If no organization meets condition 1, then an appropriate beneficiary is an organization that serves a purpose similar to the organization undergoing dissolution; or
3. If no organization meets condition 1 or 2, then an appropriate beneficiary is an organization organized and operated exclusively for arts and cultural purposes; or
4. If no beneficiary is named, the holder of the endowment account and board of the organization undergoing dissolution must contact the Montana Arts Council about the distribution of these funds.

Evaluation Criteria _____

Funding recommendations will be based on these considerations:

✓ Quality of the Project

- Do the benefitting organization and its staff and/or volunteers have the technical, artistic and administrative abilities and experience to complete and implement

the project within the grant period?

- Is the project creative, innovative, practical or beneficial?
- If the project will affect prehistoric or historic properties, what is the evaluation of the project by the State Historic Preservation Office?

✓ **Cultural Impact of the Project**

- Will the project contribute to or improve the cultural development of the service area (community(ies), county(ies), region or state)?
- Does the project address an identified need within the service area?
- Will the project establish or augment an activity or service?
- Does the project have stated goals within the resource capability of the benefitting organization and is there a reasonable likelihood the goals will be attained within the grant period?
- Will the project benefit and be accessible to the public?

✓ **Cost Factors of the Project**

- Is the project requesting special project, operational, capital expenditure or challenge grant support?
- Is the project cost-effective? How will the funds be spent? Is the cost reasonable?
- Is the relative level of local support demonstrated by cash match from local sources and/or donation of in-kind goods and services?
- Is there a mix of revenue sources for the project? If the application is being made by or on behalf of an organization that owns a cultural facility, what is the extent and type of local governmental support?
- What is the project's potential to stimulate other sources of funding or to become self-supporting?
- What is the probability the project will be accomplished within budget and with available resources?

Criteria for Committee Recommendations

Committee recommendations to the Legislature when taken as a whole will also address these considerations:

Geographical Diversity

The grants recommended should assist the entire state.

Cultural Diversity

The grants recommended should reflect and affirm the special needs of access to cultural and aesthetic projects and the unique perspective, skills, talents and contributions of all Montanans. They also should provide enrichment to the population at large. These projects should encourage the expansion of opportunities for all Montanans to create, participate in and appreciate the wide range

of all cultural and aesthetic activities regardless of age, sex, race, ethnic origin, income, physical and mental ability, or place of residence.

Project Diversity

The grants recommended should serve a variety of interests and disciplines, including:

- Local communities or counties, multi-county regions and the state.
- Single sponsors and those representing coalitions of organizations.

Funding Diversity

The grants recommended should represent a range of funding levels.

Assurances

Grant applicants must provide assurance that:

- Accounting and financial services are available and that they bear ultimate legal and fiscal responsibility for the project if funded.
- No person shall, on the grounds of race, creed, religion, color, sex, physical or mental disability, age or national origin, be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity that results from the expenditure of grant funds.

- The organization will comply with the Fair Labor Standards Act in regard to the employment of professional personnel, mechanics and laborers and with the health, safety and sanitary laws of Montana. The applicant will provide such assurance to the Montana Commissioner of Labor and Industry and the Secretary of Labor upon request.

- The organization will not use grants funds for lobbying, influencing legislation, or partisan political activity of any kind. (Hatch Act [5 U.S.C. 1501-1508] & Intergovernmental Act of 1970 as amended by Title VI of the Civil Service Reform Act.)

Grant Payment & Reporting Requirements

Notification

Applicants will be notified about funding decisions shortly after the legislative session ends.

Payments

NOTE: *As these are appropriations of projected revenue there is no guarantee the total grant amount allocated will be available. However, the Legislature has authorized payment of any unpaid grants from future funds. In all prior biennia there were sufficient funds to pay all grants.*

Until grant funds begin to flow, you may need to procure start-up cash from operating reserves, underwriting from governing units or bank loans secured by the grant payment. In addition, contingency fund-raising plans must be made to accommodate a shortfall or grant award less than the requested amount. Benefitting organizations should negotiate these arrangements and develop these plans during the application process. It is NOT RECOMMENDED that grant applicants view Cultural and Aesthetic Project grants as the sole cash source for a project unless they have other means to guarantee cash flow.

The Legislature established the following procedures for grants distribution:

- Projects awarded \$10,000 or less may receive the total grant amount in any fiscal quarter if the Cultural and Aesthetic Projects account has funds available and if an examination of the project costs shows total payment is appropriate.
- Projects awarded more than \$10,000 may receive up to 25% of the total grant after July 1, 1993; up to 50% after January 1, 1994; up to 75% after July 1, 1994; and the balance after January 1, 1995.

Narrative Section Instructions

Grant Category: Check the box on the application form that refers to the grant category in which you are applying, i.e., Special Project, Operational Support, Capital Expenditure or Challenge Grant (see page 2-6).

Use the definitions below to fill out the narrative section of the application form. The numbers correspond to those in the narrative section. Please answer all questions. If any does not apply to your project, indicate this by checking the appropriate box or by writing N/A in that section.

1 - Applicant: The governing unit applying for grant assistance.

2 - Benefitting Organization: Same as applicant OR an organization lacking legal status to be an applicant that has made arrangements for a governing unit to act as its fiscal agent, submit and sign a grant application on its behalf,

- For all projects, 5% of the total grant award will be withheld until final reports are received by the Montana Arts Council. For grantees who in the past have submitted late reports, 30% of the grant award may be held pending receipt of final reports by the Council.

Budget Modifications

Grant awards are made as legislative appropriations for specific purposes. Once the proposal and budget have been approved, legislative action is needed to modify it. The Montana Arts Council has NO AUTHORITY to increase the grant award or to allow you to modify the scope or purpose of the award. However, a grantee may modify line items in an approved budget in an amount not to exceed 10% of the total grant award. A grantee may, with permission of the Montana Arts Council, modify line items in an approved budget in an amount not to exceed 20% of the total grant award.

Reporting

Expenditures must be reported and documented every six months. The reporting periods are July 1-December 31, 1993; January 1-June 30, 1994; July 1-December 31, 1994; and January 1-June 30, 1995. Forms and instructions will be provided by the Montana Arts Council. Except for the first installment, grant payments will be made only after the grantee has filed a report for the prior six-month reporting period.

- Decisions on the release of subsequent payments will be based on the unexpended balance of your Cultural and Aesthetic Project grant and justification of future project costs during the next six months of the grant period.

and pass on such grant funds for project implementation. Please note, the applicant remains legally responsible for use of the grant funds (see Eligibility, page 2).

3 - Benefitting Organization History: If a non-profit organization is conducting the project, give the date of incorporation. If it is also tax-exempt, give the date of receipt of the IRS letter of determination as a 501(c)(3) organization. Provide a brief organizational history as part of the attached materials.

4-9 - Income/Expenses: Report the total fiscal activity of the **benefitting organization**. This includes general, operating, board-designated, cash reserve, current unrestricted and restricted funds for operating purposes. Do NOT include any funds not expendable for operating purposes, such as endowment, fixed asset or plant, loan, and scholarship funds.

- **Last year**—Use actual expense and income figures for your last fiscal year.
- **This year**—Use total actual year-to-date and budget figures for the remainder of your current fiscal year.
- **Next year**—Use budget figures for your next fiscal year.

10 - Grant Amount Requested: From Chart I, line 12, Column G.

11 - Number of Volunteers: The total number of volunteers participating in the project.

12 - Number of Individuals to Benefit: The total audience, participants, students, etc. (excluding employees and/or paid participants) anticipated to benefit. Estimate for broadcasts or large public events. Estimate the direct benefit to the general population and those with special needs, such as disabled or institutionalized populations, racial or ethnic groups, youth or the aging.

NOTE: *If your project or organization primarily benefits those with special needs, attach letters verifying the project addresses their needs and that they are involved in its planning.*

13 - Number of People Attending Events: The total number of people who attended or are estimated to attend the events, programs and activities of your organization, agency or department during the current fiscal year.

14 - Number of Events Sponsored: The total number of public events your organization, agency or department sponsored during your current fiscal year. An event is defined as the smallest unit of programming, such as a film screening, video or slide presentation, a performance, reading or lecture, an exhibition, fair or festival.

15 - Project Title:

- Special and Capital Expenditure Projects:** A short, descriptive title of the project.
- Operational Support:** "Operational Support for (name of benefitting organization or applicant)."
- Challenge Grants for Endowment Development:** "Establishment (or expansion) of a permanent endowment for (name of the benefitting organization, community or arts and cultural trust)."

16 - Description: Complete this section AFTER filling out all other narrative and budgetary information.

- Special Projects:** A brief description of activities the project will conduct.
- Operational Support:** A brief description of the benefitting organization's current program activities and/or services.
- Capital Expenditures:** A brief description of the project. If the project is part of a larger project, describe it also.
- Challenge Grants for Endowment Development:** A brief description of the project. Indicate how the interest from endowment principal will be used, such as opera-

tional support, special project support, scholarships, etc.

17 - Need: Describe why the project or operational support is needed. How was this determined? If a formal documentation of need is available, include two copies.

18 - Purpose or Goals: Describe what the project or organization will accomplish.

19 - Major Tasks: Indicate the major tasks and when they will occur.

20 - Publicity and Accessibility: Describe how you will publicize the project or organization. How will you ensure the project or organization's programs and/or services can be enjoyed by all?

21 - Evaluation:

- Special project, capital expenditure and challenge grant applications should describe what results or outcomes will be achieved. How will you determine this?
- Operational support applications should describe how the organization's progress toward its goals will be evaluated.

22 - Start Date: The first date of activity in the project. No earlier than July 1, 1993.

23 - End Date: The last day of activity in the project. No later than June 30, 1995.

24 - Overall Completion Date: If the project for which assistance is requested is part of a larger capital expenditure project, indicate its estimated date of completion.

25 - Number of paid staff: The total number of full- and part-time staff participating in the project or organization.

26 - Project History: Check the box that applies. If Yes, indicate the number of years you have conducted the project.

27 - Project Continuation: Check the box that applies.

28 - Project or Organizational Service Area: Check the boxes that best describe whom your project will primarily serve. Specify the name(s) of the community(ies), county(ies) or Indian tribe(s). Estimate the percentage of project expenditures directly serving the local area, sub-state region or entire state. These figures should add up to 100%.

- **Statewide**—a project or part of a project providing activities and/or services to the entire state. The project may be conducted by an organization with a statewide constituency and board of directors or a local or regional

organization wishing to make the project available statewide.

- **Sub-State Region**—a project or organization providing activities and/or services to adjacent counties or Indian tribes in the same geographical area.
- **Local**—a project or organization providing activities and/or services to a city, town, community, county or Indian tribe.

NOTE: *Many local organizations receive visitors and participants from around Montana and the nation. Unless your project is specifically designed to serve a non-local audience, your figures should reflect your organization's local or multi-county focus.*

29 - Cultural Facility: Check the box that applies. A cultural facility is a building or number of buildings operated significantly for the purpose of presenting public programs and activities in one or more eligible projects (see Eligibility, page 2). If not applicable, skip to Number 34.

- Applications submitted for county or municipally owned cultural facilities —Montana law requires that governmentally-owned cultural facilities must receive financial aid and in-kind support from local government. Compliance with this requirement can consist of many kinds of financial and in-kind support such as cash appropriations, in-kind services, donation of the facility in lieu of rent, or property tax forgiveness. Please describe how your organization complies with this law. Be sure to include documentation.

30 - Ownership of Cultural Facility: Check the box that applies. Specify the owner's name(s).

31 - Local Support: Check the box that applies and specify the municipality and/or county providing the support.

32 - Type of Local Support: Check the box(es) that apply and specify the level(s) of support. Provide documentation from the local government of this support. If in-kind support is being given, specify the goods and services and their value.

33 - Mill Levy Support: Specify the number of mills appropriated for your cultural facility.

34 - Indirect Costs: If the applicant, such as a college or university, has an indirect cost policy to defray overhead expenses and includes these costs in the project budget, indicate if they are used as match or are intended to be paid from the Cultural and Aesthetic Project grant.

35 - Effect to Prehistoric or Historic Properties: Benefitting organizations proposing projects that may affect prehistoric or historic properties must seek an evaluation of the project from the State Historic Preservation Office (SHPO) and include a letter from SHPO with your application (see Eligibility, page 2).

36 - Grant Priorities: If the benefitting organization is submitting more than one Cultural and Aesthetic Project grant application, list them in priority order by title, in the event that not all can be funded.

37 - Assurances and Signature of Authorizing Official: For an application to be considered for funding, it must be signed by the authorizing official of the governing unit (applicant), with the title of the authorizing official and the date the application was signed.

Budget Narrative

Sample Budget Narrative: Using our categories, attach a detailed description of each year's expense and revenue budget item (Charts I & II) for the entire project, as in the following example.

Chart I: Expenses (FY '94)

Employee Salaries & Fringe Benefits	
Administrative - Project Director salary: 20 hrs/wk for 5 wks at \$8.70/hr (\$870 total) fringe benefits: state unemployment & worker's compensation insurance, employer's share of Social Security & health insurance (15% salary/\$130 total).	\$1,000
Contracted Services	
Artistic-5 visual artists contracted for 10 hrs/wk for 3 wks at \$10.00/hr.	1,500
Travel	
Helena-Great Falls (round trip)	
Mileage 208 mi. at \$.255/mile	53
Meals 3 days at \$14.50/day	44
Room 2 nights at \$24.96/night	50
Total Cash Expenses	\$2,647
In-kind Contributions	
Space Rental	
Store front donated for 2 wks. at \$125/wk	250
Marketing	
Layout and printing of brochure and poster donated by Printfast	250
Total In-kind Contributions	500
Total Project Expenses	\$3,147

Chart II: Revenue (FY '94)

Earned Income	
Sales/Admissions-50 participants at \$10/ea.	500
Contracted Services-2 workshops at \$50/ea.	100
Contributed Income	
Foundation Support	
a. XYZ Foundation, received 8/12/90 award letter enclosed	200
b. Big Buck Foundation (pending)	300
Total Cash Revenue	\$1,100
Total In-kind Contributions	500
Total Project Revenue	\$1,600
Proposed use of Cultural Trust Grant Funds	
Employee Salaries & Fringe Benefits	
Administrative	
Project Director	440
Contracted Services	
Artistic	
5 visual artists	1,032
Travel	
Helena-Great Falls (round trip)	75
Total Grant Amount Requested	\$1,547
Total Cash Revenue	\$2,647

Budget Instructions

NOTE: Budget Form has been changed.
Contact Montana Arts Council staff if you have any questions.

Use the definitions below to fill out the budget section of the application form. The numbers correspond to the line numbers of the budget section. The grant amount requested must equal the difference between the full cost of the project and the funds you estimate will be raised from other sources. The difference appears on Chart I, Line 12, Column G. Chart II should NOT include the grant amount requested from Cultural and Aesthetic Project funds.

Chart I: Project/Organizational Expenses

Each category should include only expenses that are specifically identified with the project for which grant support is requested.

1. Employee Salaries & Fringe Benefits—for executive and supervisory administrative staff, program directors,

managing directors, business managers, press agents, fund raisers; clerical staff such as secretaries, typists, bookkeepers; supportive personnel such as maintenance and security staff, ushers, and other front-of-the-house and box office personnel.

—for architects, artistic directors, conductors, curators, dance masters, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, sculptors, graphic artists, actors, dancers, singers, musicians, teachers, instructors, puppeteers, etc.

—anthropologists, archaeologists, historians, curators, humanists, librarians, etc.

—technical management and staff, such as technical directors; wardrobe, lighting and sound crew; stage managers,

stagehands; video and film technicians, exhibit preparation and installers, etc.

2. Contracted Services—payments to firms or persons for services of individuals not normally considered employees of the organization conducting the project, but consultants or employees of other organizations, whose services are specifically identified with the project. Include the same categories listed in 1.

3. Supplies & Materials—costs incurred for scripts and scores, lumber and nails, photographic supplies, publication purchases, sets and props, food consumed on premises and equipment costing under \$1,000. Equipment costing more than \$1,000 is considered a capital expenditure.

4. Communication & Postage—costs for telephone, telegraph and postage.

5. Travel—expenses directly related to travel of individual(s). Include fares, hotel and other lodging expenses, food, taxis, gratuities, per diem payments, toll charges, mileage, allowances of personal vehicles, car rental costs, etc. Do not include expenses for trucking, shipping, hauling, or transportation not connected with the travel of personnel, which belong under "Other Operating Expenses."

6. Space Rental—rental of office, rehearsal, theatre, hall, gallery, exhibition space, artifact storage and preparatory/curatorial workspace and other such spaces.

7. Utilities—costs for electricity, gas and water.

8. Repairs & Maintenance—costs incurred for repair and maintenance of equipment and facilities.

9. Marketing—costs for marketing/publicity/promotion. Do not include payments to individuals or firms which belong under "Employee Salaries," line 1 or "Contracted Services," line 2. Include costs of newspaper, radio and television advertising, printing and mailing of brochures, flyers and posters, and food, drink and space rental when directly connected to promotion, publicity, or advertising. Fund-raising expenses should be entered under "Other Operating Expenses."

10. Other Operating Expenses—all expenses not entered in other categories. Include fundraising, storage, interest charges, photographic supplies, equipment rental, insurance fees, nonstructural renovations or improvements, trucking, shipping and hauling expenses and transportation not connected with travel of personnel.

11. Capital Expenditures—additions to a collection, such as works of art, artifacts, plants, animals or historic documents. Purchase of buildings or real estate, renovations or improvements involving structural change, payments for roads, driveways, or parking lots, permanent and generally immobile equipment such as grid systems or central air conditioning, etc.

a. Collection Acquisitions

- b. Site Purchase and Development
- c. Feasibility Studies and Design Fees
- d. Construction and Equipment Costs
- e. Other Capital Expenditure Costs
- f. Endowment—funds that will be placed in the organization's, agency's or department's endowment account. Must equal four times the grant request.

12. Total Expenses—the total of lines 1-11f.

Project/Organizational In-kind Contributions

See corresponding lines 1-11 for definitions. **In-kind Contributions** represent the value of contributions by volunteers or other parties at no cash cost to the applicant or benefitting organization. These include, but are not limited to, donations of food and housing for guest artists and speakers, office space, facilities or equipment rental, and materials voluntarily contributed that otherwise would have been paid for. Volunteer time may be claimed as an in-kind contribution, but it must be calculated at a "fair market" price (minimum wage that a person paid to do the same work would be paid). The in-kind contribution used as match for a project may not be used as match for any other project requesting Cultural and Aesthetic Project funds.

Chart II: Project/Organizational Revenue

Include projected revenue from the sources below and specifically identified with, or the proportionate share allocated to, the project for which grant support is requested.

13. Earned Income-Sales—sale of admissions, tickets, subscriptions, memberships, etc., for events of the project.

14. Earned Income-Contracted Services—fees earned through sales of services. Include sale of workshops, etc., to other community organizations, government contracts for specific services, performance or residency fees, tuitions, etc.

15. Earned Income-Other—revenue from sources other than those listed above. Include catalog sales, advertising space in programs, gift shop income, concessions, parking, investment income, etc.

16. Contributed Income-Corporate—contributions from businesses, corporations and corporate foundations.

17. Contributed Income-Foundation—contributions from private foundations and community foundations.

18. Contributed Income-Other Private—other cash donations. Do not include corporate, foundation or government contributions and grants. Include gross proceeds from fund-raising events.

- a. Cash Gifts—include income derived from the sale of real estate, property and securities, charitable lead

trusts, outright cash gifts and bequests.

- b. Life Insurance—include the eligible match amount (see Life insurance, page 5) of paid-up life insurance policies owned by the organization.
- c. Trusts—include charitable remainder trusts, pooled income funds, unitrusts, etc.
- d. Wills, Devises and Bequests—include amount of cash gifts.

19. Government Support-

- a. Federal—grants or appropriations from federal agencies, such as National Endowment for the Arts, National Endowment for the Humanities, Institute of Museum Services, Montana Committee for the Humanities, etc.
- b. Regional—grants or appropriations from state agencies, such as Montana Arts Council and/or multi-state consortiums of state agencies, such as Western States Arts Federation. Do not include Cultural and Aesthetic Project grants.
- c. Local—grants or appropriations from city, county, in-state regional and other local government agencies.

20. Organizational Cash—funds from present and/or anticipated resources that will be provided by:

- a. reserves
- b. interest or dividend income earned on reserves or endowments.

21. Total Cash Revenue—the total of lines 13-20 above.

22. Total In-kind Contributions—enter amount from Chart I, Line 12, Columns C, F, and I.

23. Total Revenue—the total of lines 21 and 22 above.

Charts III and IV: Supplemental Budget Sheets, Pages 22-25

24-46—on the supplemental budget sheet appropriate to your application, indicate the fiscal years for which information is provided. Use the budget for the most appropriate level of applicant or benefitting organization. If a governing unit will be conducting the project, use the school or department most directly involved with the project. If a governing unit is applying on behalf of a non-profit organization, use the budget of the non-profit organization. Organizational budgets should include Cultural and Aesthetic Project grant funds being requested.

Special Project Requests

Columns A and B: For a project conducted in prior years, provide actual expense and revenue information for the two most recently completed years.

Column C: Provide an organizational budget for the two-year grant period for which grant support is requested.

Operational Support Requests

Columns A and B: Provide actual expense and revenue information for the prior two fiscal years.

Column C: Provide a current fiscal year budget.

Capital Expenditure Requests

Column A: Provide an organizational budget for the two-year grant period. Only include capital expenditures not specified in your grant request.

Column B: Provide a budget for the entire capital expenditure project if it is larger than the project for which grant support is requested. **Do not complete** if it is the same as the project for which support is being requested.

Column C: Provide actual expense and revenue information for the most recently completed fiscal year.

Column D: Provide a budget estimate for the operational costs of the facility for the first full year after completion of the project.

Challenge Grant Requests

Columns A and B: Provide actual expense and revenue information for the prior two fiscal years.

Column C: Provide actual and budgeted expense and revenue information for the current fiscal year.

Column D: Provide budgeted expense and revenue information for the grant period.

Attachments Check List_____

You Must Attach the original signed application form and the following.

2 copies of:

- ☐ – an application form with supplemental budget sheet.
- ☐ – one-page resume of the project director.
- ☐ – one-page resume of administrative, artistic, technical or production staff.
- ☐ – budget narrative describing each expense and revenue item in detail for the entire project (see page 11 for example).

2 copies of:

- ☐ – documentation of kind(s) and level(s) of local government support for cultural facilities (see number 32, page 10).
- ☐ – documentation of grant funds approved (see page 21) and letters of financial consideration or commitment.
- ☐ – documentation of applicant's governmental status (see Eligibility, page 2). The letter should be on the letterhead of the governing unit and state it is a bona fide governing unit able to receive state funds, has accounting and financial services available and bears legal and financial responsibility for the grant.
- ☐ – documentation from constituency to be served, if the project will significantly address those with special needs (see number 12, page 9).
- ☐ – letter of agreement between the benefitting organization and the State Historic Preservation Office, if applicable (see Eligibility, page 2).
- ☐ – organization history (see number 3, page 8).
- ☐ – needs assessment, if available (see number 17, page 9).
- ☐ – if project will continue after grant period. Describe future program and funding plans.

For Special Project Applications

2 copies of:

- ☐ – plan for projects that generate new sources of revenue (see page 3).
- ☐ – job description(s) if project will expand current staff or add new staff, and a brief description of how increased staff will be supported after the grant period (see page 3).

Return completed application to:
Cultural and Aesthetic Projects Advisory Committee
c/o Montana Cultural Trust
316 No. Park Ave., Rm. 252
Helena, MT 59620
406/447-8390

For Operational Support Applications

2 copies of:

- ☐ – financial audit or review if your request is for \$20,000 or more (see page 3).
- ☐ – description of organization's future programs and funding plans.

For Capital Expenditure Applications Only

2 copies of:

- ☐ – renderings, working drawings or photographs of the facility to be renovated, improved or constructed or the artifacts or artwork to be acquired (see page 4).

For Challenge Grants for Endowment Development Applications (see pages 4–6)

2 copies of:

- ☐ – permanent endowment policy.
- ☐ – list of board members comprising the endowment development campaign committee.
- ☐ – list of the members of the advisory committee.
- ☐ – documentation of the endowment account holder.
- ☐ – fund-raising plan explaining how the endowment will be integrated into the overall fundraising of the organization.
- ☐ – board and staff training information.
- ☐ – marketing plan and materials to be used. If available, examples of fund-raising materials should be included.
- ☐ – budget for fund-raising if different than the budget in this application.
- ☐ – documentation of anticipated planned or deferred gifts, including trusts, insurance, wills and bequests, etc.

If submitting a cooperative endowment application,

2 copies of:

- ☐ – letter of agreement and supplemental budgets.

You May Attach_____

- ☐ – 2 copies – supplemental material you feel will help the committee better understand your project. Use only standard 8½" x 11" paper for all material submitted.
- ☐ – 1 copy – drawings, photographs, slides (no more than 10), 16mm motion picture film, VHS videotape, phonograph records, compact disks, or audio cassettes.

1994-1995 Montana Cultural Trust Application Form

Grant Category (Check one): ☐ Special Project ☐ Operational Support ☐ Capital Expenditure
☐ Challenge Grant

1. Applicant

Governing Unit _____
Contact Person _____
Title _____
Address _____
City, State, Zip Code _____

Daytime Telephone _____
Evening Telephone _____
Federal Identification Number
_____-_____-_____

2. Benefitting Organization

Organization _____
Contact Person _____
Title _____
Address _____
City, State, Zip Code _____
Daytime Telephone _____
Evening Telephone _____
Federal Identification Number
_____-_____-_____

4. Last Year Operating Income
\$ _____
5. Last Year Operating Expenses
\$ _____
6. Present Year Operating Income
\$ _____
7. Present Year Operating Expenses
\$ _____
8. Next Year Operating Income
\$ _____
9. Next Year Operating Expenses
\$ _____

3. Non-profit Organization (if applicable)
Incorporation date ____/____/____
IRS 501(c)(3) determination date ____/____/____

Project/Organizational Information

10. Grant Amount Requested
\$ _____

11. Volunteers Involved _____

12. Individuals to Benefit

General Audience: _____
Special Populations: _____
Total to Benefit: _____

13. Number of people attending events _____

14. Number of events sponsored _____

15. Project Title _____

Below is For Office Use Only

Project Category: ☐ Art

☐ History

☐ Other/Cultural

Community Type: ☐ Rural

☐ Urban

Applicant Status: ☐ ☐

Applicant Institution: ☐ ☐

Applicant Discipline: ☐ ☐ ☐

Project Discipline: ☐ ☐ ☐

Type of Activity: ☐ ☐

Project Type: ☐ ☐ ☐

Date Received: _____

Grant Number: _____

History Number: _____

Grant Category: _____

Congressional District: _____

16. Description

17. Need

18. Purpose or Goals

19. Major Tasks

20. Publicity and Accessibility

21. Evaluation

22. Start Date

____/____/____
(no earlier than 7/1/93)

23. End Date

____/____/____
(no later than 6/30/95)24. Overall Completion Date (for Capital Expenditure Requests) ____/____/____ ☐ Not Applicable

25. Number of paid staff involved in project. Full-time = _____ Part-time = _____

26. Has this project been conducted in years prior to the grant period?

☐ No ☐ Yes, for _____ years ☐ Not Applicable for Operational Support Requests27. Will the project continue after the grant period? ☐ No ☐ Yes ☐ Not Applicable

28. Project or Organization Service Area:

Expenditure %

<input type="checkbox"/> Statewide:	
<input type="checkbox"/> Sub-state region (counties or tribes):	
<input type="checkbox"/> Local (city, county or tribe):	
Total:	100%

29. Is this application being made by or on behalf of an organization which owns a cultural facility? ☐ No ☐ Yes If No, skip to question 34.30. Who owns the cultural facility? ☐ Not Applicable

<input type="checkbox"/> Private individual, partnership or profit-making corporation:
<input type="checkbox"/> Non-profit corporation:
<input type="checkbox"/> Municipality:
<input type="checkbox"/> County:
<input type="checkbox"/> Montana State Agency:
<input type="checkbox"/> Federal Agency:
<input type="checkbox"/> Other:

31. Does this cultural facility receive either municipal or county financial or in-kind support? ☐ No ☐ Yes ☐ Not Applicable

32. What kind and value of support is given annually by the municipality or county?

<input type="checkbox"/> Not Applicable	
<input type="checkbox"/> General Funds: \$	<input type="checkbox"/> Mill Levy: \$
<input type="checkbox"/> Revenue Sharing: \$	<input type="checkbox"/> Block Grant: \$
<input type="checkbox"/> Other Cash: \$	<input type="checkbox"/> In-kind: \$

Total Value: \$

33. Specify the number of mills appropriated for the cultural facility:

Mills ☐ Not Applicable

34. Indirect costs:

<input type="checkbox"/> Not Applicable
<input type="checkbox"/> Used as match: \$
<input type="checkbox"/> Paid from grant: \$

35. Have you contacted the State Historic Preservation Office to obtain a letter of agreement, if applicable?

☐ Yes ☐ No ☐ Not Applicable

36. Priorities: If you are applying for more than one Cultural and Aesthetic Project grant, list them in priority order by title.

Priority #1:
Priority #2:
Priority #3:
Priority #4:

37. I understand that by making application for Cultural and Aesthetic Project funds from the Cultural Trust Fund the governing unit I represent will provide financial and accounting services and will be fiscally and legally responsible for the completion of the project, if funded.

I assure that no person shall, on the grounds of race, creed, religion, color, sex, physical or mental handicap, age or national origin, be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity which results from the expenditure of grant funds.

I assure that the organization will comply with the Fair Labor Standards Act in regard to the employment of professional personnel, mechanics and laborers, and the health, safety and sanitary laws of Montana and that this assurance will be provided to the Montana Commissioner of Labor and Industry or the Secretary of Labor upon request.

I assure that the organization will comply with the Hatch Act (5 U.S.C. 1501-1508) and the Intergovernmental Act of 1970 as amended by Title VI of the Civil Service Reform Act and that none of the funds granted will be utilized for lobbying, influencing legislation, or partisan political activity of any kind.

Signature of Authorizing Official

Date

Authorizing Official (please type or print name)

Title

Governing Unit

1994-1995 Montana Cultural Trust Grant Application

Check One: ☐ Special Project ☐ Operational Support ☐ Capital Expenditure ☐ Challenge Grant

Budget Section

Benefiting Organization: _____

Instructions

1. Complete Charts I and II. Include only expense and revenue information for the project for which grant assistance is requested.
2. Complete the Supplemental Budget Sheet (Charts III & IV) for the grant category in which you are applying.
3. Provide budget narrative detail on separate sheets.
4. Round off all figures to the nearest dollar.
5. Fiscal Year 1994 = July 1, 1993-June 30, 1994. Fiscal Year 1995 = July 1, 1994-June 30, 1995.

Chart I: Project/Organizational Expenses

	Fiscal Yr. '94			Fiscal Yr. '95			Total		Grand Total All
	Grant	Cash	In-Kind	Grant	Cash	In-Kind	Grant	Cash	
1. Employee Salaries & Fringe Benefits									
2. Contracted Services									
3. Supplies & Materials									
4. Communications & Postage									
5. Travel									
6. Rent									
7. Utilities									
8. Repairs & Maintenance									
9. Marketing									
10. Other									
11. a. Capital Expenditures-Acquisitions									
b. Site Purchase & Development									
c. Feasibility Studies & Design Fees									
d. Construction Costs (Labor & Materials)									
e. Capital Expenditures-Other									
12. TOTAL EXPENSES (lines 1-11)									

A

B

C

D

E

F

G

H

I

J

Column G = Sum of Columns A & D
Column H = Sum of Columns B & E

Column I = Sum of Columns C & F
Column J = Sum of Columns G, H, & I

Benefitting Organization: _____

Chart II: Project/Organizational Revenue

Do NOT include the Cultural and Aesthetic Project grant amount requested.

	Fiscal Yr. '94	Fiscal Yr. '95	Total
13. Earned Income—Sales & Memberships			
14. Earned Income—Contracted Services			
15. Earned Income—Other			
16. * Contributed Income—Corporate			
17. * Contributed Income—Foundation			
18. * Contributed Income—Private			
a. Cash			
b. Life Insurance			
c. Trusts			
d. Wills & Bequests			
19. * Government Support			
a. Federal			
b. State/Regional			
c. Local			
20. Organizational Cash			
a. Reserves			
b. Interest/Dividend Income			
21. TOTAL CASH REVENUE (total lines 13–20b)			
22. Total In-kind Contributions (Chart I, Line 12, Cols. C, F, & I)			
23. TOTAL REVENUE (line 21 + line 22)			

A

B

C

*In the Budget Narrative, indicate the status of these funds. Are they "on hand," approved but not yet received, pending, or application to be made at some future date? If the latter, indicate date of application and tentative date of approval.
Documentation of approved grant support must be provided.

Supplemental Budget Sheet—Special Project Request

Instructions

1. If you are requesting funds for a project that has been conducted in prior years, provide actual expense and revenue information for the most recent TWO COMPLETE years. Complete Charts III and IV, Columns A and B, indicating the fiscal years in the space provided.
2. You MUST provide an ORGANIZATIONAL BUDGET for the two-year grant period for which this grant is requested. Figures should reflect the ENTIRE BUDGET (see numbers 4 through 9, page 8) of the organization, agency or department conducting the project. Complete Charts III and IV, Column C.

Chart III: Expenses

	Column A Prior Project Fiscal Year 19__	Column B Prior Project Fiscal Year 19__	Column C Organizational Budget Fiscal Year 94/95
24. Employee Salaries & Fringe Benefits			
25. Contracted Services			
26. Supplies & Materials			
27. Communications & Postage			
28. Travel			
29. Rent			
30. Utilities			
31. Repairs & Maintenance			
32. Marketing			
33. Other			
34. a. Capital Expenditures—Acquisitions			
b. Site Purchase & Development			
c. Feasibility Studies & Design Fees			
d. Construction Costs (Labor & Materials)			
e. Capital Expenditures—Other			
f. Endowment			
35. Total in-kind Contributions			
36. TOTAL EXPENSES (lines 24–35)			

Chart IV: Revenue

Include the Cultural and Aesthetic Project grant amount requested.

	Column A Prior Project Fiscal Year 19__	Column B Prior Project Fiscal Year 19__	Column C Organizational Budget Fiscal Year 94/95
37. Earned Income—Sales & Memberships			
38. Earned Income—Contracted Services			
39. Earned Income—Other			
40. Contributed Income—Corporate			
41. Contributed Income—Foundation			
42. Contributed Income—Private			
a. Cash			
b. Life Insurance			
c. Trusts			
d. Wills & Bequests			
43. Government Support			
a. Federal			
b. State/Regional			
c. Local			
44. Organizational Cash			
a. Reserves			
b. Interest/Dividend Income			
45. TOTAL CASH REVENUE (total lines 37–44b)			
46. Total In-kind Contributions			
47. TOTAL REVENUE (line 45 + line 46)			

Supplemental Budget Sheet—Operational Support Request

Instructions

1. You must provide ACTUAL expense and revenue information for the PRIOR TWO fiscal years. Indicate the fiscal years in the spaces provided below. Complete Charts III and IV, Columns A and B.
2. You MUST provide an ORGANIZATIONAL BUDGET for the two-year grant period for which this grant is requested. Figures should reflect the ENTIRE BUDGET (see numbers 4 through 9, page 8) of the organization, agency or department conducting the project. Complete Charts III and IV, Column C.

Chart III: Expenses

	Column A Organizational Budget Fiscal Year 19__	Column B Organizational Budget Fiscal Year 19__	Column C Organizational Budget Fiscal Year 94/95
24. Employee Salaries & Fringe Benefits			
25. Contracted Services			
26. Supplies & Materials			
27. Communications & Postage			
28. Travel			
29. Rent			
30. Utilities			
31. Repairs & Maintenance			
32. Marketing			
33. Other			
34. a. Capital Expenditures—Acquisitions			
b. Site Purchase & Development			
c. Feasibility Studies & Design Fees			
d. Construction Costs (Labor & Materials)			
e. Capital Expenditures—Other			
f. Endowment			
35. Total In-kind Contributions			
36. TOTAL EXPENSES (lines 24–35)			

Chart IV: Revenue

Include the Cultural and Aesthetic Project grant amount requested.

	Column A Organizational Budget Fiscal Year 19__	Column B Organizational Budget Fiscal Year 19__	Column C Organizational Budget Fiscal Year 94/95
37. Earned Income—Sales & Memberships			
38. Earned Income—Contracted Services			
39. Earned Income—Other			
40. Contributed Income—Corporate			
41. Contributed Income—Foundation			
42. Contributed Income—Private			
a. Cash			
b. Life Insurance			
c. Trusts			
d. Wills & Bequests			
43. Government Support			
a. Federal			
b. State/Regional			
c. Local			
44. Organizational Cash			
a. Reserves			
b. Interest/Dividend Income			
45. TOTAL CASH REVENUE (total lines 37–44b)			
46. Total In-kind Contributions			
47. TOTAL REVENUE (line 45 + line 46)			

Supplemental Budget Sheet— *Capital Expenditure Request*

Instructions

All applicants **MUST** provide an **ORGANIZATIONAL BUDGET** for the two-year grant period (Charts III and IV, Column A). Figures should reflect the **ENTIRE BUDGET** (see page 8, numbers 4–9 of the organization, agency or department conducting the project.)

Applications for facility construction or renovation **MUST** provide:

1. **A budget of the entire capital expenditure project**, if greater than project funds being requested from the Cultural Trust Fund (Charts III and IV, Column B).
2. **Actual Operational costs** from the most recently completed fiscal year, if the facility is currently in operation (Charts III and IV, Column C).
3. **A budget estimate of the operational costs** of the facility for the first full year after the completion of the project (Charts III and IV, Column D).

Chart III: Expenses

	Column A Organizational Budget	Column B Entire Project	Column C Operational Costs—Actual	Column D Opera. Costs—Estimate
24. Employee Salaries & Fringe Benefits				
25. Contracted Services				
26. Supplies & Materials				
27. Communications & Postage				
28. Travel				
29. Rent				
30. Utilities				
31. Repairs & Maintenance				
32. Marketing				
33. Other				
34. a. Capital Expenditures—Acquisitions				
b. Site Purchase & Development				
c. Feasibility Studies & Design Fees				
d. Construction Costs (Labor & Materials)				
e. Capital Expenditures—Other				
f. Endowment				
35. Total In-kind Contributions				
36. TOTAL EXPENSES (lines 24–35)				

Chart IV: Revenue

Include the Cultural and Aesthetic Project grant amount requested.

	Organizational Budget	Entire Project	Organizational Costs—Actual	Organizational Costs—Estimate
37. Earned Income—Sales & Memberships				
38. Earned Income—Contracted Services				
39. Earned Income—Other				
40. Contributed Income—Corporate				
41. Contributed Income—Foundation				
42. Contributed Income—Private				
a. Cash				
b. Life Insurance				
c. Trusts				
d. Wills & Bequests				
43. Government Support				
a. Federal				
b. State/Regional				
c. Local				
44. Organizational Cash				
a. Reserves				
b. Interest/Dividend Income				
45. TOTAL CASH REVENUE (total lines 37–44b)				
46. Total In-kind Contributions				
47. TOTAL REVENUE (line 45 + line 46)				

Supplemental Budget Sheet—Challenge Grant Request

Instructions

1. You must provide ACTUAL expense and revenue information for the PRIOR TWO fiscal years of the organization (Columns A and B) and actual budget figures for the CURRENT fiscal year (Column C).
2. You MUST provide an ORGANIZATIONAL BUDGET for the two-year grant period for which this grant is requested (Column D). Figures should reflect the ENTIRE BUDGET (see page 8, numbers 4 through 9) of the organization, agency or department conducting the project.

Chart III: Expenses

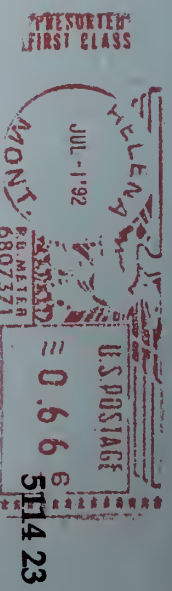
	Column A Prior Fiscal Year 19__	Column B Prior Fiscal Year 19__	Column C Current Year	Column D Grant Period
24. Employee Salaries & Fringe Benefits				
25. Contracted Services				
26. Supplies & Materials				
27. Communications & Postage				
28. Travel				
29. Rent				
30. Utilities				
31. Repairs & Maintenance				
32. Marketing				
33. Other				
34. a. Capital Expenditures—Acquisitions				
b. Site Purchase & Development				
c. Feasibility Studies & Design Fees				
d. Construction Costs (Labor & Materials)				
e. Capital Expenditures—Other				
f. Endowment				
35. Total In-kind Contributions				
36. TOTAL EXPENSES (lines 24–35)				

Chart IV: Revenue

Include the Cultural and Aesthetic Project grant amount requested.

	Column A Prior Fiscal Year 19__	Column B Prior Fiscal Year 19__	Column C Current Year	Column D Grant Period
37. Earned Income—Sales & Memberships				
38. Earned Income—Contracted Services				
39. Earned Income—Other				
40. Contributed Income—Corporate				
41. Contributed Income—Foundation				
42. Contributed Income—Private				
a. Cash				
b. Life Insurance				
c. Trusts				
d. Wills & Bequests				
43. Government Support				
a. Federal				
b. State/Regional				
c. Local				
44. Organizational Cash				
a. Reserves				
b. Interest/Dividend Income				
45. TOTAL CASH REVENUE (total lines 37–44b)				
46. Total In-kind Contributions				
47. TOTAL REVENUE (line 45 + line 46)				

Cultural and Aesthetic Projects Advisory Committee
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IMPORTANT: Grant Information

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